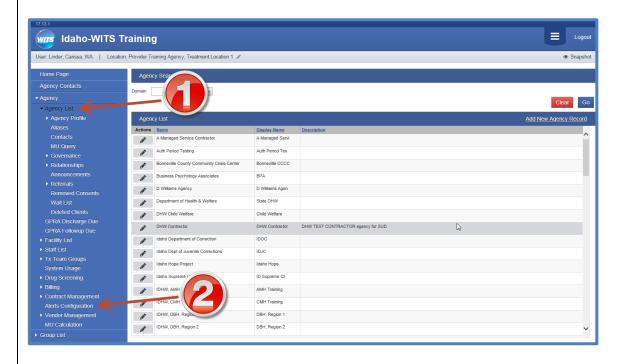
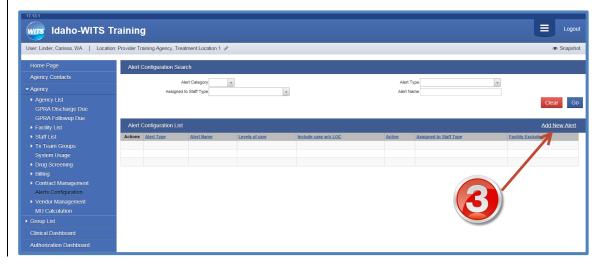
Creating an Inactive Client Alert

This alert indicates the active clients where there has not been an encounter or miscellaneous note for some period of time.

- Getting here: Login, on the Navigation Pane (left menu) select <u>Agency</u> to activate the Agency List menu.
- 2. Select Alerts Configuration.
- 3. Select Add New Alert.





- 4. Enter Alert Name.
- 5. Select <u>Inactive Client</u> as the <u>Alert type</u>
- **6.** Enter the message in **What message should** appear to users?
- **7.** Complete these fields.
 - When is the next activity due (days after the trigger point)?
 - How many days prior to the due date should this alert show up?
 - Which staff should recive the message?
 - Should message turn red when overdue?
- **8.** Select the appropriate <u>Levels of Care</u> this alert applies to. Use the greater than sign (>) to move them to the box on the right.

Note: If you do not select the level of care the alert will not work properly.

- **9.** Select any <u>Facilities</u> this alert *will not* apply to. Use the greater than sign (>) to move them to the box on the right.
- **10.** Enter the <u>Number of Days</u> you want this alert to show.
- 11. Enter the Effective Date.
- 12. Select Finish.

